

**Before the  
FEDERAL COMMUNICATIONS COMMISSION  
Washington, DC 20554**

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In the Matter of

Framework for Broadband Internet Service

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GN Docket No. 10-127

**COMMENTS OF THE MOBILE INTERNET CONTENT COALITION**

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Dated: July 15, 2010

The Mobile Internet Content Coalition (“MICC”), through counsel, files these Comments in response to the Notice of Inquiry released June 17, 2010, in this docket (“NOI”). These comments support the efforts of the Chairman to ensure an open Internet through the NOI, which necessarily includes consumers’ access to the content of their choosing without improper interference by internet service providers, including wireless carriers. Whatever legal means the Federal Communications Commission (“FCC”) decides upon, the MICC commends the FCC for working towards an open Internet.

## **I. INTRODUCTION AND SUMMARY**

The MICC consists of entrepreneurial technology and marketing companies that share a common vision of enabling consumers to access the mobile Internet, mobile messaging, and mobile content with freedom and convenience equal to that of the traditional Internet. The companies that make up the MICC include businesses of all sizes that provide consumers content over fixed and mobile Internet connections, and include 4INFO, Inc. (“4INFO”), Myxer Inc. (“Myxer”), mobileStorm, Inc. (“mobileStorm”), and others (collectively, “Mobile Content Providers”). Mobile Content Providers use many different technological means to provide content, including short code text messages, the mobile web, and the wired web.

As described in MICC’s prior comments and *ex parte* filings on these issues,<sup>1</sup> the MICC believes that consumers should have the unfettered ability to access the

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<sup>1</sup> See e.g., *Ex Parte* of the Mobile Internet Content Coalition in *Petition of Public Knowledge et al. for Declaratory Ruling Stating that Text Messaging and Short Codes are Title II Services or are Title I Services Subject to Section 202 Nondiscrimination Rules*, WT Docket No. 08-7; *Preserving the Open Internet*, GN Docket No. 09-191; and *Broadband Industry Practices*, WC Docket No. 07-52 (filed June 11, 2010); Reply Comments of the Mobile Internet Content Coalition in *Preserving the Open Internet*, GN

content of their choice via a web browser, SMS message, or any other technologically feasible means. The NOI asks for comment on whether wired and wireless broadband Internet services should be treated differently. NOI ¶¶ 102-105. The MICC submits that all methods of accessing the Internet should be treated the same – all open Internet standards and practices that would apply to the wired Web should equally apply to the wireless Web. Accessing content from the Internet on a Mobile Device (the “Mobile Internet”), should be as convenient or even more convenient for consumers as is the traditional Internet. The MICC encourages the Commission to ensure that internet service providers, whether they are wired or wireless, operate under technology-neutral rules that protect consumers from blocking or other practices that would prevent consumers from accessing the lawful content of their choosing.

## **II. CONSUMERS SUFFER WHEN MOBILE CONTENT PROVIDERS CANNOT OPERATE FREELY**

Consumers want content over the Internet, and consumers are increasingly seeking that content over the Mobile Internet, through text messages and the wireless Internet. While the popularity of obtaining content over the Mobile Internet is exploding, consolidation in the wireless industry has also quickened. As shown in the FCC’s 14th Annual Report on Mobile Wireless Competition, while there is a proliferation of mobile

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Docket No. 09-191 and *Broadband Industry Practices*, WC Docket No. 07-52 (filed April 26, 2010); Comments of 4INFO, Inc. in *Preserving the Open Internet*, GN Docket No. 09-191 and *Broadband Industry Practices*, WC Docket No. 07-52 (filed January 14, 2010); *Ex Parte* of Myxer Inc. in *Broadband Industry Practices*, WC Docket No. 07-52; *Petition of Public Knowledge et al. for Declaratory Ruling Stating that Text Messaging and Short Codes are Title II Services or are Title I Services Subject to Section 202 Nondiscrimination Rules*, WT Docket No. 08-7; *National Broadband Plan for Our Future*, GN Docket No. 09-51; *Fostering Innovation in the Wireless Communications Market*, GN Docket No. 09-157; and *Preserving the Open Internet*, GN Docket No. 09-191 (filed October 23, 2009).

devices and applications, there is also increasing consolidation in the industry as only a few wireless carriers control the majority of the market.<sup>2</sup> Mobile devices are increasingly becoming more than just phone. For the year 2009, data traffic exceeded voice traffic and that will only increase in 2010.<sup>3</sup> Some analysts predict mobile phones will eventually become the primary means of accessing the Internet by U.S. consumers. Text messaging is driving growth in the wireless marketplace. The United States is one of the top text messaging nations in the world with 592 text messages per subscriber per month.<sup>4</sup> Text messages are increasingly becoming another means for consumers to access the Mobile Internet and the content there. Short message service (“SMS”) has made text messages an even easier way to distribute content to mobile phones, including feature phones that may be more limited than smartphones.

Despite this explosion of consumer desire for mobile content, members of the MICC and other Mobile Content Providers have not always been able to operate in an open Internet environment and consumers have suffered as a result. Mobile Content Providers face barriers to entry and operation in the wireless marketplace, which in turn limits the content that consumers have access to. As described in earlier MICC filings with the FCC, Mobile Content Providers must endure an expensive and often long registration process to even have the opportunity to provide content to consumers. At

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<sup>2</sup> *In the Matter of Implementation of Section 6002(b) of the Omnibus Budget Reconciliation Act of 1993 Annual Report and Analysis of Competitive Market Conditions With Respect to Mobile Wireless, Including Commercial Mobile Services*, Fourteenth Report, FCC 10-81, at page 6 (May 20, 2010).

<sup>3</sup> Chetan Sharma Consulting, US Wireless Data Market Update - Q4 2009 and 2009, *available at* <http://www.chetansharma.com/usmarketupdate2009.htm>.

<sup>4</sup> *Id.*

any time a wireless carrier can audit and reject a campaign proposed by a Mobile Content Provider for any reason. And, even once operating, Mobile Content Providers still face audits, blocking, and other barriers to successful content distribution by wireless carriers. Faced with these systemic obstacles, it is no wonder that the U.S. lags in mobile commerce despite strong consumer demand.<sup>5</sup> The MICC detailed multiple instances of blocking in its prior filings and the harm that befalls consumers when a Mobile Content Provider is prevented from sharing content with a consumer that wants that content.

All of these barriers to entry and operation ultimately harm the consumer. Mobile Content Providers have content that consumers desire, but if a Mobile Content Provider is blocked or must exit the marketplace, consumers lose access to that content. That of course is the very definition of irreparable harm – a consumer blocked yesterday cannot go back in time and access the content of their choosing. For the period of blocking, the “bell cannot be unrung.” Moreover, even once blocking ceases, the harm may continue as some consumers continue to believe that they cannot transact with these companies. Any period of disruption may cause a consumer to abandon a service permanently.

Consumers also suffer from the compensation regimes set up by wireless carriers. As part of the wireless carriers’ requirements to support a short code campaign and in order to sell content, a Mobile Content Provider is required to exclusively use the billing systems set up by the wireless carrier, so that any charge for content must appear on the wireless subscriber’s bill. A Mobile Content Provider has no choice but to use the wireless carrier’s billing system if they want the carrier to support their short code

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<sup>5</sup> See e.g., Sybase-365, *Global Consumer Acceptance + Usage Report April 2010*, attached as Exhibit A.

campaign. Further, wireless carriers often demand a substantial portion of the compensation paid for the content. This creates an environment where a consumer cannot buy desired mobile content via short code without it appearing on their wireless bill. In other words, the consumer cannot pay via credit card, debit card, paypal, or any other means if they wish to. Moreover, the “cut” demanded by wireless carriers raises the price of mobile content, because Mobile Content Providers must cover their own costs of operation in addition to paying whatever cut is demanded by the wireless carrier.

Consumers should be able to avoid the wireless carrier’s billing regime if they want to. This would open up competition and Mobile Content Providers would potentially be able to lower the cost of paid content because they would not have to provide an unreasonable percentage of sales as a cut to wireless carriers.

### **III. CONCLUSION**

Consumers will only benefit from open Internet principles, including applying open Internet principles to wireless networks. Consumers will have access to more content and the marketplace will benefit from increased competition. Consumers win when Mobile Content Providers can freely offer lawful content without interference from internet service providers, whether they are wired or wireless broadband providers.

“As the Commission has observed, [s]o far in the Internet’s history, the basic standards underlying the operation of the Internet have created the equivalent of perfect competition . . . among applications and content . . . *with a minimum [of] interference by the network or platform owner.*”<sup>6</sup> Currently, there is much more than a minimum of interference by the wireless network owners in the mobile Internet and

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<sup>6</sup> Notice of Proposed Rulemaking ¶ 52, *Preserving the Open Internet*, GN Docket No. 09-191 and *Broadband Industry Practices*, WC Docket No. 07-52 (rel. Oct. 22, 2009) (emphasis added) (citations and quotations omitted).

consumers suffer due to the lack of competition that is a result of this interference. This is not a theoretical problem – numerous Mobile Content Providers have faced challenges caused by the control wireless carriers exert over the wireless networks. Text messages are an increasingly common means to access mobile content and the mobile Internet, and should be unrestricted. From a business's and consumer's point of view, the Internet is the same whether it is accessed from a desktop computer or a mobile device. In fact, consumers are demanding to have easy and open access to the information and content they want from the Internet from multiple devices. The open Internet principles supported by the Commission should apply to all providers of broadband access, whether wired or wireless.

For all these reasons, the Commission should promulgate and enforce open Internet rules that are technology-neutral to ensure open access to wireless networks, including the receipt of text messages.

Dated: July 15, 2010

Respectfully submitted,

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# Exhibit A





## **Operator Services: Mobile CRM, mPayments + Next Generation Services**

**Global Consumer Acceptance + Usage Report  
April 2010**

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# Main Findings

The mobile phone market has matured significantly in the last three years, and consumers are looking for more from their phones. With smart-phone ownership showing massive growth, the range of functions a phone is expected to perform has multiplied. The Sybase 365 Global Mobile Usage Report looks at user trends in approaching and utilising mobile services across sixteen global territories. The research finds a changed market from that surveyed in 2007, with consumers showing a greatly increased appetite for mobile services.

2010 looks set to be the year that mobile commerce capabilities come of age; mobile phones evolving from being simple communication devices to increasingly being life management tools, entertainment systems and virtual wallets. Predictions for increased mobile advertising spend, the fusion of social and mobile devices and explosion of associated “apps” have all served to fuel consumer appetite for more and better mobile services. Users are increasingly aware of “Next Generation” services such as VoIP and improved QoS. The challenge for operators in 2010 will be to adapt their mobile offerings to this increased demand, and find ways to target their services at specific segments of their customer base.

## Usage of mobile services reaching maturity

The research shows that people are beginning to take additional paid mobile services seriously and it is no longer out of the ordinary for users to be using their mobiles for sophisticated personal uses and information gathering. The survey shows that almost half of all mobile users use their handset to access the internet (48%) on a weekly basis, and 30%, globally, use mobile banking services.

## Appetite for new services growing

Alongside high usage of current services the majority of users also want to expand their current horizons. 70% want extra services, including high tech next generation offerings such as mobile to VOIP with over half of users interested (55%), as well as emergency alerts (46%) and mobile banking (39%).

## Users are willing to pay for mobile services

A significant group of users are prepared to pay for these extra services, with typically between 20% and 40% of those who are interested in a service showing a willingness to pay. With higher quality services online or becoming available users are reflecting this by expecting, and showing a willingness to pay, higher prices.

70%

are interested in extra mobile services

55%

would pay for at least one additional mobile service

48%

use mobile internet weekly

55%

want to instant message with a PC

# Methodology

The research was conducted in sixteen countries using an online methodology. At least 250 mobile phone users participated in the survey in each country. Overall, the survey was completed by slightly more than 4,100 mobile users.

The countries in the survey were United Kingdom, Spain, Germany, Italy, France, South Africa, Mexico, United States, Argentina, Canada, India, China, Singapore, Malaysia, Indonesia, and Australia.

The research was commissioned by Sybase 365 and conducted by Loudhouse Research, an independent market research consultancy based in the UK. The research follows on from two previous studies conducted by Sybase 365 and Loudhouse, a 2007 study looking at consumer appetite for mobile banking, and a 2008 survey of decision makers with responsibility for implementing mobile banking.

For clarity all pricing in this report is shown in £ (GBP), during the survey consumers were presented equivalent price points in their local currency. See Appendix A for price points used.

# Service Awareness + Usage

The study shows clearly that users are, in overwhelming numbers, aware of the extra functions or services that can be accessed via mobile phones. Almost all users know they can access internet or send e-mails from a mobile (over 90% awareness in both cases), and awareness of the intangible aspects of their mobile services such as quality of service and enhanced security.

Around one-half of users access the internet (48%) from their handsets at least once a week, with about the same percentage listening to music (49%) and slightly fewer emailing (43%).

28% of users receive mobile community updates on at least a weekly basis (fig. 2).

The research shows that users are engaging in more sophisticated mobile services than in 2007.

Looking at next generation services, significant percentages are interested with 55% wanting technology that allows them to instant message with a PC and 50% interested in being able to make calls to and from a webcam.

## 90%

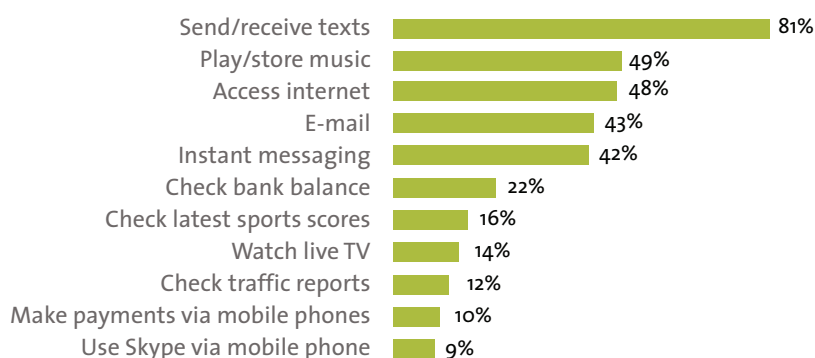
users know they can access internet or send e-mails from a mobile

## Top 3 services

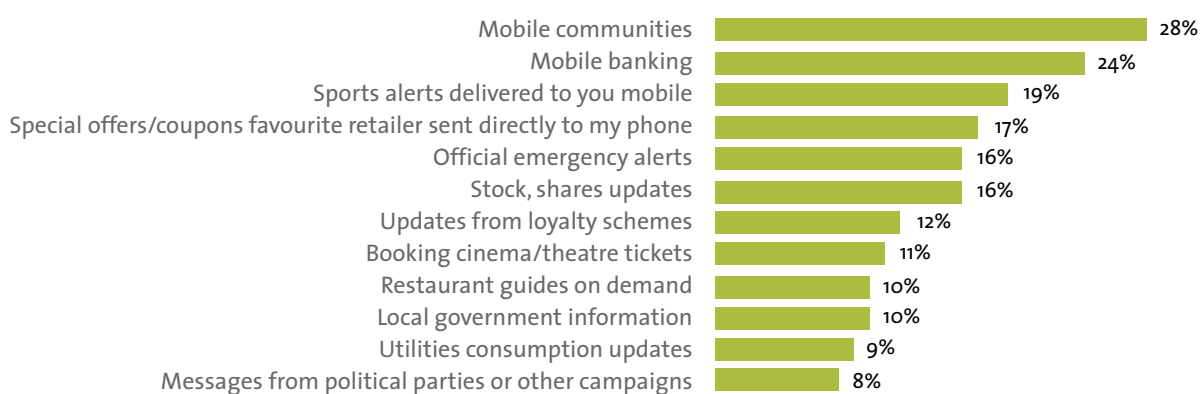
The most valuable services were ticketing, emergency alerts and special offers/couponing

# Service Awareness + Usage

**Figure 1: Q1b. How often have you used [the following mobile] services? (% “weekly”). Base: all mobile users**



**Figure 2: Q2b. How often have you used the service? (% “weekly”). Base: all mobile users**



# Next Generation Services

The challenge when rolling-out underlying network services is communicating the benefits to end consumers. What was clear from the survey that consumers not only responded positively to these new 'Next Generation' services, but were also willing to pay incremental fees for them.

## Thirst for IM and video

When presented with next generation services, significant percentages are interested, with 55% wanting technology that allows them to instant message with a PC and 50% interested in being able to make calls to and from a webcam. Closely following was interest for IM between mobile and PCs.

## Pricing Challenge

About 65% of all of those surveyed are interested in purchasing at least one service. For Next Generation services, users were presented with a range of price points from £1 to £5. As the table shows, consumers were willing to pay an average of £2.46, with Mobile VoIP being seen as the service that they would pay the most for.

During analysis of response to price points, we found that if a service was presented at a lower price point (such as £1) it would receive a less favorable response than when presented at a higher price; this indicates the risk of under pricing a service and making it less attractive to consumers.

The challenge is to get to the right person with the right service at the right price. Developing economies were found to be purchasing hot-spots, with our analysis showing that the most enthusiastic potential purchasers are in India and Mexico. In either of these countries mobile users are four times as likely to purchase a mobile service they like than German mobile users.

Service	Value	Demand
Mobile to VoIP	£2.55	21%
Calls between mobile and web cam	£2.47	27%
Instant messaging phone/PC	£2.44	26%
Better browsing app	£2.42	20%
Improved security	£2.38	21%

# Service Pricing

## Purchase inclination

A significant proportion of those participating in the survey indicated a clear willingness to purchase mobile services. Growing awareness and appetite for these services has led to a related increase in those who are willing to pay for them. The data shows more than half (55%) of the sample will purchase at least one of the services researched, while typically between 20% and 40% of those interested in a particular service describe themselves as willing to pay.

In the survey mobile users were asked about the value of currently available services. The highest values (fig. 3) were attributed to stocks and shares updates and mobile banking, two intrinsically financial activities. Also valued highly were updates from political parties or interest groups, although only a very small percentage of the mobile universe (1%, fig. 4) would consider paying for these services.

At the other end of the value spectrum, loyalty scheme updates and offers and coupons are perceived, even by those willing to pay, to have lower intrinsic value; as items typically received for free it may be difficult to position to consumers as paid-for. Despite this, the number of users who would consider paying for offers and coupons is high (11%).

When asked about their favourite potential service, users were more likely to say they would invest in a service at £3 (41%) than at £1 (30%), suggesting that the relationship between service cost and subscription is a complex one. While we seek value in purchases (most commonly associated with lower cost), when looking at mobile services, mobile users make a clear connection between premium services and the investment required.

## Next Generation Services

Somewhere between 20% and 30% of survey participants will purchase Next Generation mobile services. The most popular is calls to webcam with 27% prepared to pay at an average of £2.47 per month.

**55%**

would purchase at least one of the mobile services researched

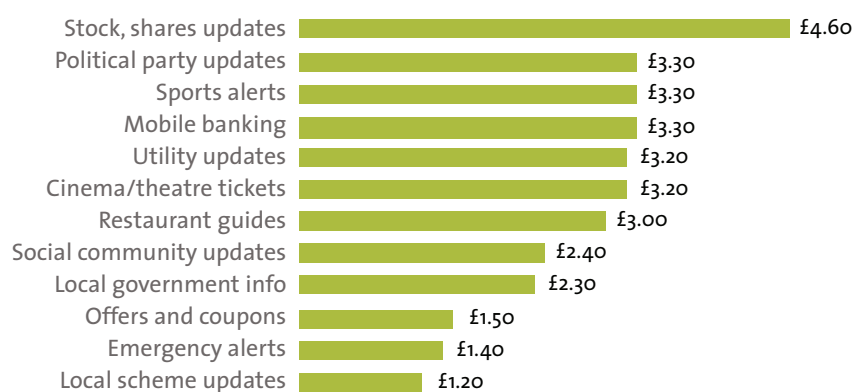
**11%**

would consider paying for offers and coupons

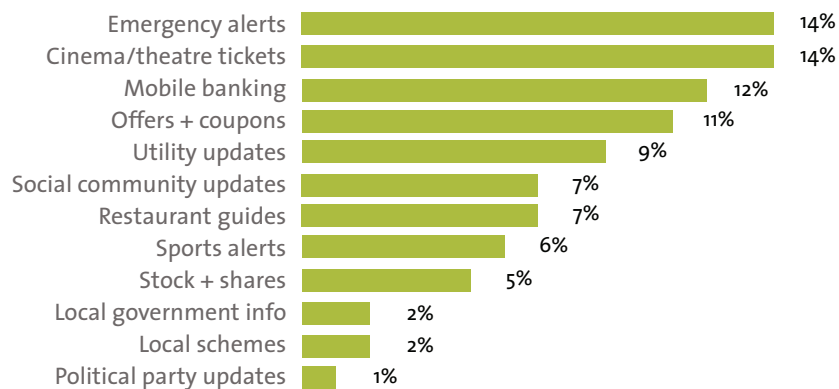


# Service Pricing

**Figure 3: Q3** If the services you find valuable was priced at £5/£3/£1 per month how likely to purchase would you be? Base: all who were interested in the service



**Figure 4: Q2e/Q3** Likelihood to purchase (if one of top 3 most valuable services), Base: all mobile users



# Summary

The last two to three years can be characterised by unprecedented changes in the sophistication of mobile handsets and associated applications. Consumer appetite for new and better services that serve to entertain, empower and make life easier continues unabated and is evidenced in the uptake of paid mobile services in recent years. For a significant proportion of consumers, the availability of certain additional services via mobile is becoming essential to the mobile experience, and many are willing to pay for the added value they provide.

Asian appetite for new services leads the way globally. We see that typically 20% more Asian respondents are interested in additional services than the global average, and about 30% more Asian than European respondents are interested in mobile community updates (50% to 18%) and mobile banking (54% to 26%).

A majority of mobile users worldwide show a willingness to pay for additional services, providing the right service at the right price is available to them. Value is perceived to be greatest around financial services, such as mobile banking and stock and share updates. For services regarded as valuable, users will pay a premium.

Intrinsic value does not always translate into a willingness to pay and this brings to light the challenge facing mobile providers as services begin to mature. The ability to anticipate consumer needs and to target users accordingly is one that still eludes many companies exploring mobile service provision for the first time. Consumers are displaying an increasing sophistication in their mobile phone usage and are more knowledgeable and demanding than ever in their service requirements – transaction oriented services very much in the ascendant.

CRM has been discussed and applied within the mobile space with varying degrees of success. Understanding and targeting customer needs effectively is critical for companies wanting to capitalise on current mobile service opportunities. As appetite for services increases, however, the stakes are much higher if the ability to understand and target customer needs fails.

## 20%

more Asian respondents are interested in additional services than the global average

## 30%

more Asian than European respondents are interested in mobile community updates

# Segmentation

The segments below were generated through Cluster Analysis on the data from the Sybase365 Global Consumer Awareness + Usage Report.

Note: Each archetype only represents the statistically most likely member of any segment. All segments are populated by all nationalities, ages, and both genders

## The Enthusiast

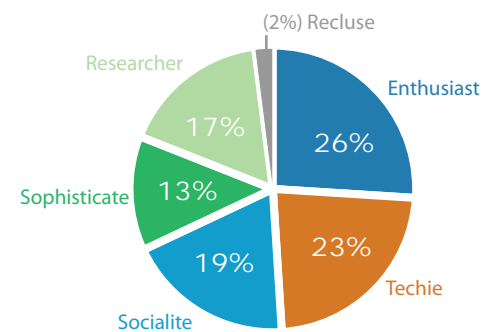
The archetypal Enthusiast, is a man in his mid 20s in China. He uses his mobile as a life-management tool, banking, paying bills, gathering information, and spending a great deal of time managing his social life. His phone use is practical, he is less interested in future developments instead he wants real world day-to-day equipment. Enthusiasts account for 26% of all mobile users surveyed. Should the Enthusiast be offered a product of interest – there is a 70% chance he will consider purchase. The key products for this segment are day-to-day social and business tools for example restaurant guides, social networking updates, and banking support

## The Techie

The archetypal Techie is an Indonesian man in his later 20s. He is a technological trendsetter and is likely to be exactly on-trend with the latest apps. His handset would ideally be a computer. He strives for it to replicate all of the functionality his computer offers. Techies account for 23% of the mobile population. If the product offered is of interest it is likely to be considered (as a purchase) by 45% of the population. The key products for Techies are next generation services, and high end financial tools.

## The Socialite

The Socialite archetype is an Italian man in his mid 30s. His phone is used for speed and connectivity and any devices/apps which allow him to achieve this are most welcome. He also wants to pick up lots of lifestyle information to help him enjoy his life more. Socialites account for 19% of all users. If the right product is offered, purchase consideration in this segment will hover around 30%. The key products for Socialites include coupons and offers and social network information.



**The Sophisticate**

Could typically be a French woman in her later 30s. Sophisticates use the internet for all activities and are very technology savvy. A Sophisticate uses her phone to stay on top of her finances, from the mundane (balance checking) right through to checking her investments. She is not interested in networking with her handset, seeing her handset as an upmarket organiser. Sophisticates account for 13% of all users. Given the right product a Sophisticate is 25% likely to consider purchasing. The right products for this group are stock and share updates, high-end coupons, and banking

**The Researcher**

The Researcher could be a German woman in her 40s. She is likely to use her phone as an information gathering tool, perhaps as an alternative to a library. She is community focussed and very interested in all locally significant data. Researchers are 17% of the mobile population. Given the right product a Researcher is 5% likely to consider purchasing. The services that most interest a Researcher are Local Govt information and Emergency Alerts.

**The Recluse**

The Recluse is the oldest and most Western segment. She could be presented by a woman in her 40s or 50s from the USA. She uses her handset simply as a phone and has no interest in further services, let alone paying for them. Recluses are only 2% of the population. They are interested in no products.



70%

**Enthusiasts** follow technology largely for social convenience reasons and will pay for it. They are happy to bank and handle finances.



40%

**Techies** follow and value technology more, they will gravitate towards next gen products.



30%

**Socialites** use technology to get social and lifestyle information.



25%

**Sophisticates** like to shop online and have the tech know-how.



5%

**The Researcher** follows local Govt and politics based issues but will not pay.

0%

**The Recluse** uses the phone strictly as a phone and no more.

# Americas

## Regional Overview

Users in the Americas are engaging with their mobiles and willing to pay for content. Usage of some features is lower than in other regions (particularly Asia Pacific) but overall engagement is high. 67% say they 'like to be contactable at all times' and 75% are 'confident with technology', both slightly higher than average worldwide.

There is a suggestion, particularly in the USA, of a two-tier system of mobile usage, with relatively high numbers entirely disengaged from mobile (unaware, for example, of text messaging) yet higher than average numbers engaging with cutting-edge features like live TV and Skype. Overall though, usage of key features is relatively high, with a third across the Americas sample emailing via mobile on a weekly basis, and 37% using instant messaging.

Large proportions of those interviewed will pay for new mobile services, with 45% of the sample willing to purchase at least one of the new services mentioned. Willingness to pay, though, is significantly lower in North America than in South America.

**33%**

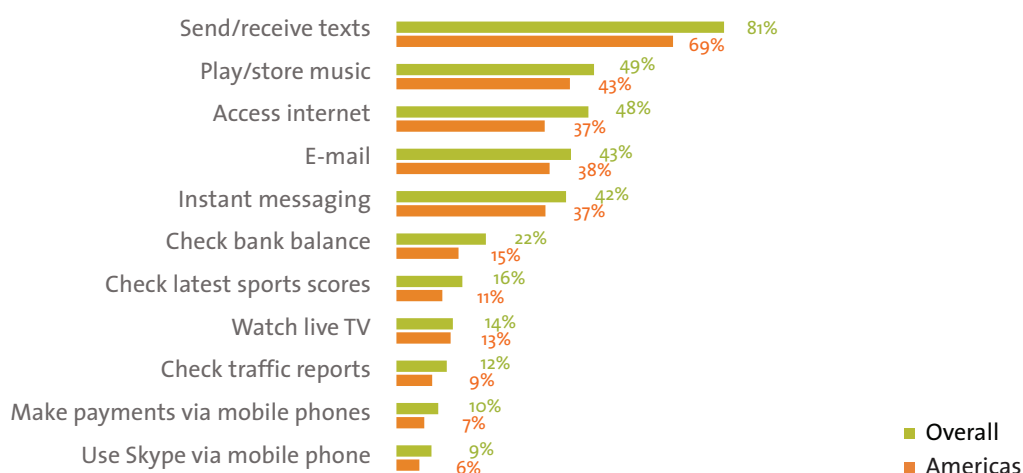
emailing via mobile on a  
weekly basis

**37%**

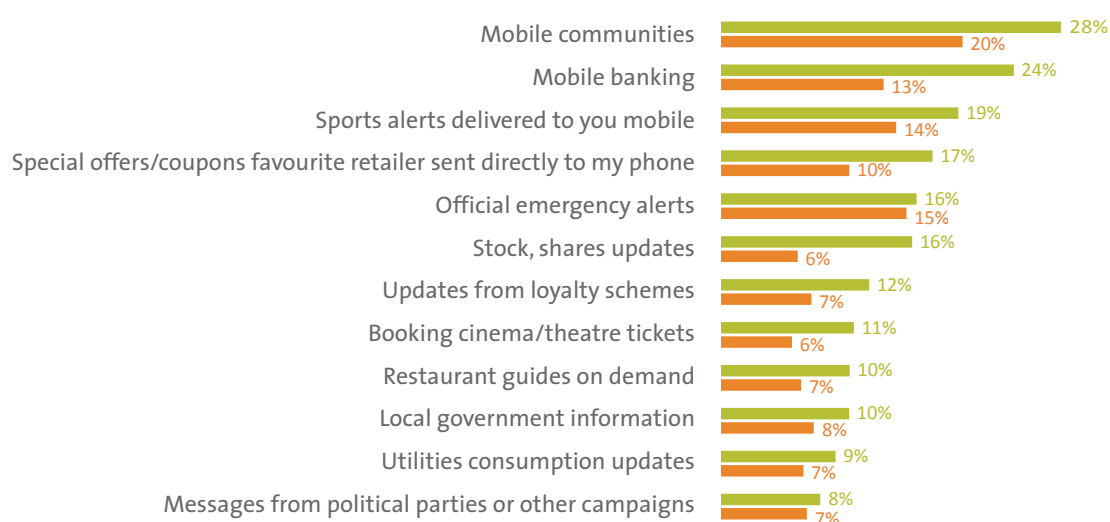
use instant messaging

# Americas: Service Awareness + Usage

**Figure 1: Q1b. How often have you used [the following mobile] services? (% “weekly”). Base: all mobile users**



**Figure 2: Q2b. How often have you used the service? (% “weekly”). Base: all mobile users**



# Americas: Pricing

## Purchase inclination

A significant proportion of those participating in the survey indicated a clear willingness to purchase mobile services. Purchase interest in the Americas is slightly below average, and well behind Asia Pacific, but ahead of Europe. The data shows that 45% of the sample in the Americas will purchase at least one of the services researched, just below the worldwide average of 55%. Typically, between 25% and 45% of those in the region interested in a particular service describe themselves as willing to pay.

Some services are more likely to lead to purchases in the Americas than elsewhere. Respondents in the region are more likely than average to be interested in emergency updates (fig. 3, 19% vs 14%), cinema tickets (16% vs 14%) and utilities information (12% vs 9%).

The South American countries, Mexico in particular, show an increased willingness to pay for services. The USA and Canada are more reluctant, perhaps due to extended experience of free services online. Convincing mobile users in more 'developed' countries of the value of new services is crucial to future strategies in these territories.

## Next Generation Services

Next Generation services (fig. 4), likewise, have considerable appeal. 62% are interested in instant messaging between mobile and PC (higher than the global average of 56%) and 55% are interested in calls between mobile and webcams (50% average).

# 45%

will purchase at least one of the services researched, just below the worldwide average of 55%

# Americas: Pricing

Figure 3: Q2e/Q3 Likelihood to purchase (if one of top 3 most valuable services). Base: all mobile users

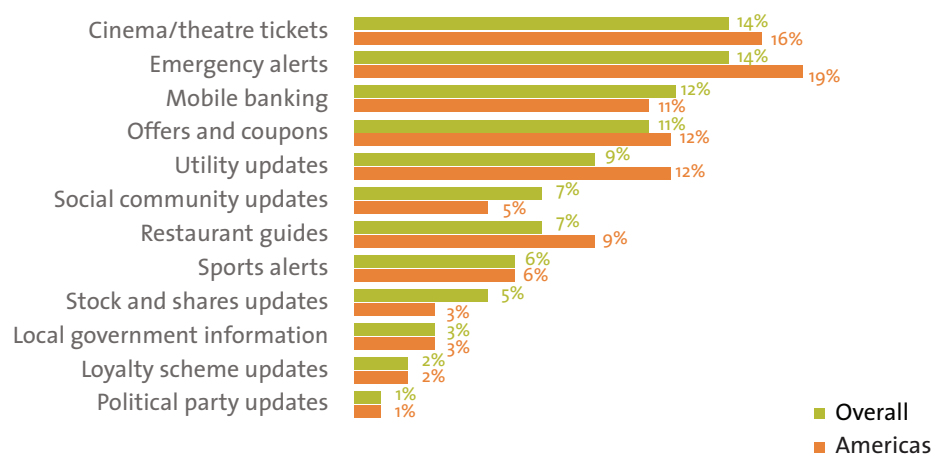
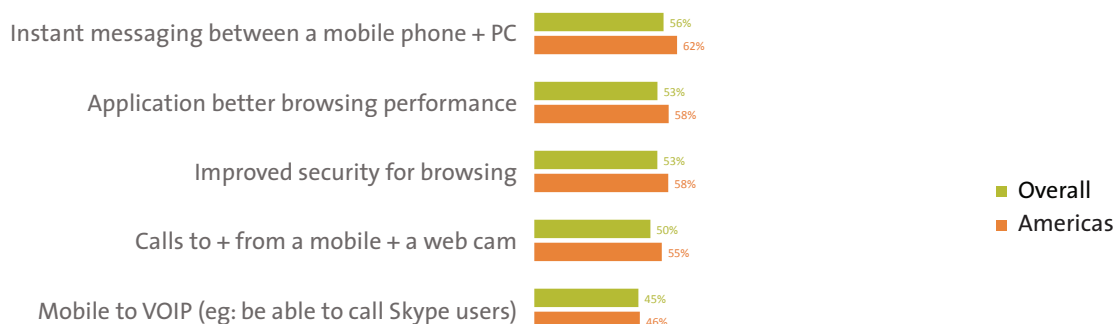


Figure 4A: How interested in the following services would you be?





# Americas: Tables by country

**Q1b. How often have you used [the following mobile] services? (% “weekly”). Base: all mobile users**

	Overall	Total	USA	Canada	Mexico	Argentina
Base	4167	1072	288	256	260	268
Send/receive texts	81%	69%	43%	39%	96%	97%
Play/store music	49%	43%	16%	17%	81%	61%
Access internet	48%	37%	25%	29%	55%	39%
E-mail	43%	38%	27%	33%	55%	38%
Instant messaging	42%	37%	20%	25%	59%	45%
Check bank balance	22%	15%	18%	15%	14%	15%
Check latest sports scores	16%	11%	14%	7%	17%	7%
Watch live TV	14%	13%	13%	8%	23%	10%
Check traffic reports	12%	9%	9%	8%	13%	5%
Make payments via mobile phone	10%	7%	8%	6%	8%	6%
Use Skype via mobile phone	9%	6%	3%	4%	9%	6%

**Q2b. How often have you used the service? (% “weekly”). Base: all mobile users**

	Overall	Total	USA	Canada	Mexico	Argentina
Base	4167	1072	288	256	260	268
Mobile communities (alerts about activities of friends of your choice from a social network)	28%	20%	12%	14%	35%	19%
Mobile banking (this is voiceless banking, using text/internet)	24%	13%	13%	12%	16%	12%
Sports alerts (football, cricket scores etc) delivered to your mobile	19%	14%	10%	7%	34%	7%
Special offers and coupons from my favourite retailer sent directly to my phone	17%	10%	6%	7%	21%	9%
Official emergency alerts (e.g. bad weather, major accidents)	16%	15%	12%	8%	34%	7%
Stocks, shares (investment) updates	16%	6%	8%	6%	8%	3%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	12%	7%	6%	6%	13%	4%
Booking cinema/theatre tickets (by text/internet)	11%	6%	7%	2%	11%	4%
Restaurant guides on demand	10%	7%	7%	4%	12%	3%
Local Government information	10%	8%	5%	3%	18%	5%
Utilities (Gas, Water, Electricity) consumption updates	9%	7%	7%	5%	9%	6%
Messages from political parties or other campaigns (e.g. Greenpeace)	8%	7%	4%	3%	15%	6%

**Q2c. How interested in the services do you think you would be? Base: All mobile users**

	Overall	Total	USA	Canada	Mexico	Argentina
Base	4167	1072	288	256	260	268
Official emergency alerts (e.g. bad weather, major accidents)	46%	48%	40%	48%	66%	44%
Utilities (Gas, Water, Electricity) consumption updates	38%	42%	64%	15%	49%	36%
Booking cinema/theatre tickets (by text/internet)	41%	42%	64%	21%	47%	33%
Restaurant guides on demand	36%	35%	57%	26%	34%	20%
Special offers and coupons from my favourite retailer sent directly to my phone	39%	40%	55%	23%	46%	36%
Local Government information	31%	28%	66%	7%	24%	11%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	32%	31%	67%	15%	24%	12%
Stocks, shares (investment) updates	30%	29%	74%	8%	21%	8%
Mobile banking (this is voiceless banking, using text/internet)	39%	41%	64%	21%	47%	30%
Messages from political parties or other campaigns (e.g. Greenpeace)	28%	29%	79%	3%	14%	9%
Mobile communities (alerts about activities of friends of your choice from a social network)	32%	34%	68%	11%	35%	16%
Sports alerts (football, cricket scores etc) delivered to your mobile	27%	28%	75%	6%	16%	7%

# Americas: Tables by country

**Q4a. How interested in the following services would you be? Base: all mobile users**

	Overall	Total	USA	Canada	Mexico	Argentina
Base	4167	1072	288	256	260	268
Instant messaging between a mobile phone and a PC	56%	62%	45%	44%	86%	73%
Application better browsing performance	53%	58%	38%	52%	81%	64%
Improved security for browsing	53%	58%	35%	57%	80%	62%
Calls to and from a mobile and a web cam	50%	55%	53%	32%	79%	57%
Mobile to VOIP (e.g. be able to call Skype users)	45%	46%	57%	29%	53%	42%

**Q2e/Q3 Likelihood to purchase (if one of top 3 most valuable services). Base: all mobile users**

	Overall	Total	USA	Canada	Mexico	Argentina
Base	4167	1072	288	256	260	268
Booking cinema/theatre tickets	14%	16%	8%	4%	33%	25%
Official emergency alerts	14%	19%	10%	9%	39%	22%
Utilities (Gas, Water, Electricity) consumption updates	9%	12%	8%	3%	19%	20%
Special offers and coupons	11%	12%	9%	5%	22%	14%
Mobile banking updates	12%	11%	8%	4%	20%	12%
Sports Alerts	6%	6%	4%	3%	13%	7%
Local Government information	2%	3%	0%	3%	8%	7%
Restaurant guides on demand	7%	9%	5%	4%	14%	6%
Mobile communities updates	7%	5%	3%	3%	14%	6%
Messages from political parties or other campaigns (e.g. Greenpeace)	1%	1%	0%	0%	0%	2%
Stocks, shares (investment) updates	5%	3%	0%	5%	8%	0%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	2%	2%	2%	0%	5%	0%

**Q6b Which the following services would you be interested in...? Base: all mobile users**

	Overall	Total	USA	Canada	Mexico	Argentina
Base	4167	1072	288	256	260	268
Reports of potentially fraudulent transactions on your account	75%	66%	50%	64%	82%	69%
Account balance enquires	69%	61%	43%	51%	77%	73%
Being able to freeze a card	65%	54%	41%	53%	71%	54%
Be alerted when a bill or credit card payment is due	60%	51%	34%	42%	70%	62%
Updates when transactions take place	60%	48%	37%	40%	68%	50%
Pay a bill or card	59%	52%	35%	40%	70%	63%
Request a call back from customer services	54%	50%	34%	30%	76%	61%
Statements on request	53%	37%	30%	29%	47%	43%
Overdraft alerts	52%	46%	40%	39%	60%	47%
Use mobile banking to Top Up my mobile phone (or offspring)	50%	42%	16%	22%	75%	57%
Communicating with your insurance company by SMS (e.g. alerts on the status of a claim)	43%	36%	19%	20%	62%	44%
Information requests e.g. interest rates/exchange rates	41%	32%	17%	26%	53%	32%
Stock market information	29%	16%	15%	12%	28%	10%
Financial offers	28%	20%	14%	9%	40%	16%
Marketing messages	21%	13%	13%	6%	27%	9%

# Asia Pacific

## Regional Overview

Mobile users in the Asia Pacific region are more engaged with their mobiles than users in other countries surveyed and are more likely to be using more technologically advanced features. 69% say they 'like to be contactable at all times' (against 65% worldwide) and 78% are 'confident with technology' (vs. 74%).

**69%**

say they 'like to be contactable at all times'

**78%**

are 'confident with technology'

# Asia Pacific: Service Awareness + Usage

Awareness of mobile services in the Asia Pacific region is broadly in line with worldwide trends, with the exception of slightly higher engagement with mobile banking.

Mobile users in the Asia Pacific region are using more mobile functions than average (fig. 1), and awareness of a service is more likely to have translated to regular usage. In the Asia Pacific region, 50% of those who are aware of any one of these mobile services, on average, are likely to be weekly users of it, against only 40% worldwide.

Mobile internet is significantly more developed (61% use weekly against 48% worldwide) and texting is almost universal in the region (92% against 81% worldwide).

More niche services (fig. 2) also show higher usage levels. Users in the Asia Pacific region are twice as likely as those in either EMEA or the Americas to be using mobile communities (41% against 20% in each of the other regions) and more than four times as likely as those in the Americas to be getting share updates (28% vs 6%).

**61%**

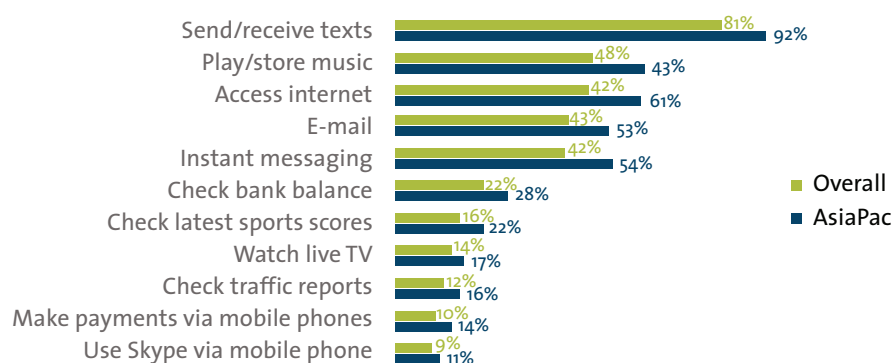
use mobile internet

**92%**

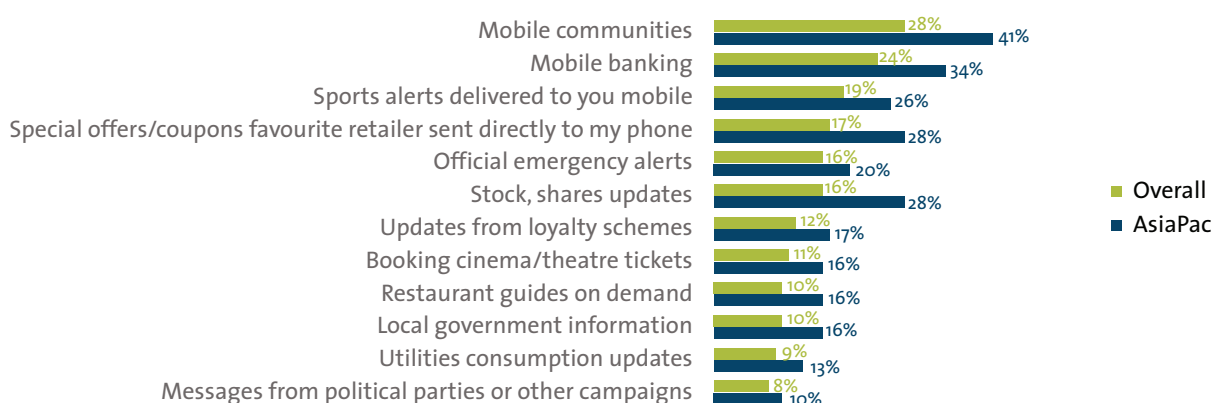
use texting

# Asia Pacific: Service Awareness + Usage

**Figure 1: Q1b. How often have you used [the following mobile] services? (% “weekly”). Base: all mobile users**



**Figure 2: Q2b. How often have you used the service? (% “weekly”). Base: all mobile users**



# Asia Pacific: Pricing

**Purchase inclination:** A significant proportion of those participating in the survey indicated a clear willingness to purchase mobile services. This suggests that users are reaching or have reached the point of being convinced that truly high quality services are or will shortly be available on mobile. The data shows that 70% of the sample in the Asia Pacific region will purchase at least one of the services researched, higher than the worldwide average of 55%. Typically, between 30% and 50% of those in the region interested in a particular service describe themselves as willing to pay.

In terms of specific features (fig. 3), there are certain services that those in the Asia Pacific region are more likely to pay for. They are also slightly more likely to pay for coupons (13% vs 11%). In line with worldwide averages, the most popular option is cinema tickets, which 14% would pay for.

Willingness to pay varies significantly by country. Respondents in China and India are most likely to pay for almost every service, suggesting generally higher levels of receptiveness to payment for intangible mobile/online features in these countries. Australians, in common with those in other 'developed' countries like the UK and the USA, are much less likely to pay for any services.

## Next Generation Services

Next Generation services also show strong appeal in the Asia Pacific region. 62% would be interested in calls between mobiles and webcams, against 50% worldwide, and 58% are interested in mobile to VOIP calls (45% worldwide). Users in the region will pay an average of £2.80 per month for next generation applications.

## 70%

will purchase at least one of the services researched, higher than the worldwide average of 55%

# Asia Pacific: Pricing

Figure 3: Q2e/Q3 Likelihood to purchase (if one of top 3 most valuable services). Base: all mobile users

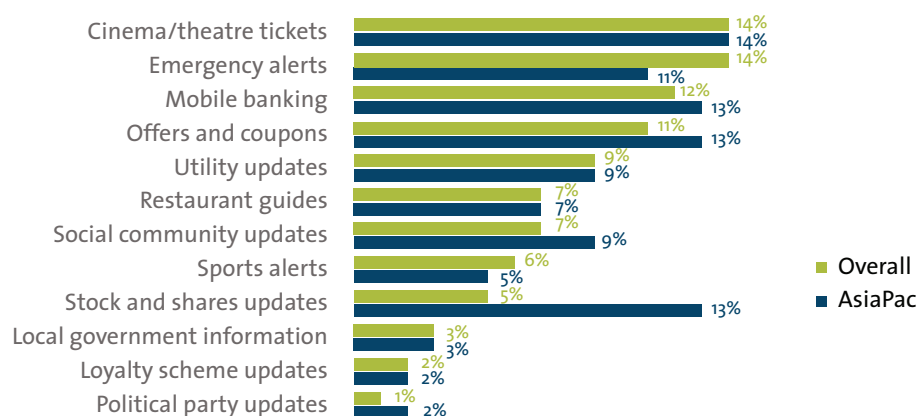
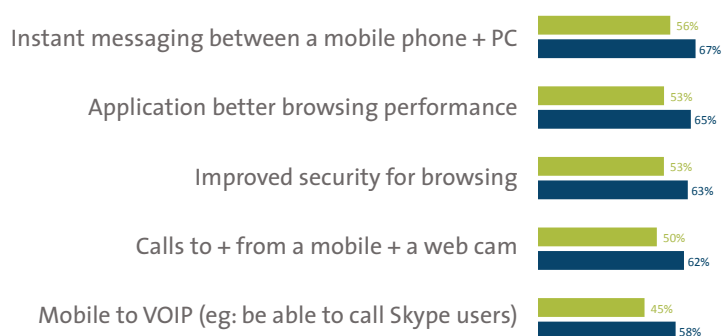


Figure 4A: How interested in the following services would you be?



# Asia Pacific: Tables by country

**Q1b. How often have you used [the following mobile] services? (% “weekly”). Base: All mobile users**

	Overall	Total	India	Australia	AsiaPac China	Indonesia	Malaysia	Singapore
Base	4167	1552	264	259	257	262	251	259
Send/receive texts	81%	92%	90%	81%	98%	98%	92%	92%
Play/store music	49%	62%	71%	20%	84%	77%	60%	61%
Access internet	48%	61%	66%	24%	85%	79%	51%	62%
E-mail	43%	53%	63%	20%	68%	61%	50%	53%
Instant messaging	42%	54%	64%	22%	82%	60%	37%	57%
Check bank balance	22%	28%	40%	12%	39%	35%	20%	19%
Check latest sports scores	16%	22%	41%	6%	33%	13%	13%	23%
Watch live TV	14%	17%	14%	3%	35%	15%	17%	19%
Check traffic reports	12%	16%	17%	3%	37%	9%	9%	22%
Make payments via mobile phone	10%	14%	20%	5%	32%	9%	6%	10%
Use Skype via mobile phone	9%	11%	14%	3%	26%	6%	3%	13%

**Q2b. How often have you used the service? (% “weekly”). Base: All mobile users**

	Overall	Total	India	Australia	AsiaPac China	Indonesia	Malaysia	Singapore
Base	4167	1552	264	259	257	262	251	259
Mobile communities (alerts about activities of friends of your choice from a social network)	28%	41%	55%	10%	54%	61%	29%	37%
Mobile banking (this is voiceless banking, using text/internet)	24%	34%	47%	13%	51%	40%	22%	28%
Sports alerts (football, cricket scores etc) delivered to your mobile	19%	26%	52%	5%	48%	11%	19%	20%
Special offers and coupons from my favourite retailer sent directly to my phone	17%	28%	43%	7%	53%	20%	12%	32%
Official emergency alerts (e.g. bad weather, major accidents)	16%	20%	28%	6%	49%	12%	7%	17%
Stocks, shares (investment) updates	16%	28%	42%	8%	66%	16%	11%	25%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	12%	17%	30%	5%	34%	8%	7%	15%
Booking cinema/theatre tickets (by text/internet)	11%	16%	28%	4%	22%	8%	13%	18%
Restaurant guides on demand	10%	16%	18%	5%	41%	7%	7%	16%
Local Government information	10%	16%	26%	3%	33%	6%	8%	18%
Utilities (Gas, Water, Electricity) consumption updates	9%	13%	18%	4%	39%	3%	8%	9%
Messages from political parties or other campaigns (e.g. Greenpeace)	8%	10%	18%	3%	21%	4%	7%	7%

**Q2c. How interested in the services do you think you would be? Base: All mobile users**

	Overall	Total	India	Australia	AsiaPac China	Indonesia	Malaysia	Singapore
Base	4167	1552	264	259	257	262	251	259
Official emergency alerts (e.g. bad weather, major accidents)	46%	55%	13%	26%	92%	84%	75%	68%
Utilities (Gas, Water, Electricity) consumption updates	38%	51%	12%	56%	79%	60%	53%	49%
Booking cinema/theatre tickets (by text/internet)	41%	57%	19%	53%	65%	68%	64%	63%
Restaurant guides on demand	36%	53%	21%	57%	75%	59%	54%	61%
Special offers and coupons from my favourite retailer sent directly to my phone	39%	54%	15%	47%	78%	67%	68%	59%
Local Government information	31%	44%	23%	59%	59%	44%	43%	33%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	32%	46%	18%	58%	68%	44%	41%	47%
Stocks, shares (investment) updates	30%	47%	26%	71%	66%	45%	38%	38%
Mobile banking (this is voiceless banking, using text/internet)	39%	54%	17%	55%	77%	75%	57%	51%
Messages from political parties or other campaigns (e.g. Greenpeace)	28%	40%	47%	83%	53%	17%	20%	18%
Mobile communities (alerts about activities of friends of your choice from a social network)	32%	50%	19%	65%	54%	52%	51%	42%
Sports alerts (football, cricket scores etc) delivered to your mobile	27%	37%	30%	68%	39%	30%	24%	18%



# Asia Pacific: Tables by country

**Q4a. How interested in the following services would you be? Base: All mobile users**

	Overall	Total	India	Australia	AsiaPac		Malaysia	Singapore
	4167	1552	264	259	China	Indonesia	251	259
Base					257	262		
Instant messaging between a mobile phone and a PC	56%	67%	10%	34%	95%	93%	85%	85%
Application better browsing performance	53%	65%	6%	24%	93%	94%	89%	83%
Improved security for browsing	53%	63%	5%	24%	89%	92%	92%	80%
Calls to and from a mobile and a web cam	50%	62%	10%	46%	82%	82%	78%	75%
Mobile to VOIP (e.g. be able to call Skype users)	45%	58%	16%	40%	80%	84%	70%	61%

**Q2e/Q3 Likelihood to purchase (if one of top 3 most valuable services). Base: All mobile users**

	Overall	Total	India	Australia	AsiaPac		Malaysia	Singapore
	4167	1552	264	259	China	Indonesia	251	259
Base					257	262		
Booking cinema/theatre tickets	14%	14%	26%	5%	14%	4%	20%	21%
Official emergency alerts	14%	11%	13%	5%	20%	13%	12%	3%
Mobile banking updates	12%	13%	15%	3%	18%	15%	16%	11%
Special offers and coupons	11%	13%	18%	4%	22%	9%	9%	14%
Utilities (Gas, Water, Electricity) consumption updates	9%	9%	19%	1%	13%	7%	3%	5%
Restaurant guides on demand	7%	7%	5%	6%	10%	6%	7%	13%
Mobile communities updates	7%	9%	13%	5%	12%	15%	5%	2%
Sports Alerts	6%	5%	16%	2%	10%	6%	4%	7%
Stocks, shares (investment) updates	5%	13%	18%	3%	25%	8%	8%	9%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	2%	2%	5%	0%	0%	3%	3%	2%
Local Government information	2%	3%	4%	0%	4%	3%	7%	2%
Messages from political parties or other campaigns (e.g. Greenpeace)	1%	2%	3%	0%	3%	1%	4%	0%

**Q6b Which the following services would you be interested in...? Base: All mobile users**

	Overall	Total	India	Australia	AsiaPac		Malaysia	Singapore
	4167	1552	264	259	China	Indonesia	251	259
Base					257	262		
Reports of potentially fraudulent transactions on your account	75%	83%	76%	63%	89%	97%	88%	82%
Account balance enquires	69%	82%	84%	43%	96%	97%	88%	86%
Being able to freeze a card	65%	71%	61%	49%	80%	92%	73%	69%
Be alerted when a bill or credit card payment is due	60%	76%	77%	40%	88%	89%	80%	83%
Updates when transactions take place	60%	77%	80%	36%	91%	85%	88%	82%
Pay a bill or card	59%	74%	75%	33%	88%	88%	78%	80%
Request a call back from customer services	54%	65%	60%	36%	75%	80%	66%	70%
Statements on request	53%	66%	73%	24%	86%	59%	82%	76%
Overdraft alerts	52%	61%	48%	25%	87%	85%	74%	49%
Use mobile banking to Top Up my mobile phone (or offspring)	50%	61%	66%	18%	85%	78%	67%	51%
Communicating with your insurance company by SMS (e.g. alerts on the status of a claim)	43%	55%	58%	21%	72%	68%	57%	55%
Information requests e.g. interest rates/exchange rates	41%	58%	55%	20%	72%	71%	64%	66%
Stock market information	29%	48%	53%	14%	79%	52%	46%	45%
Financial offers	28%	43%	43%	9%	74%	53%	47%	33%
Marketing messages	21%	34%	31%	8%	65%	40%	33%	25%

# EMEA

## Regional Overview

While some way behind mobile users in the Asia Pacific countries, EMEA users still show huge engagement with their mobiles and are using technologically advanced features. Two-fifths (40%) access the internet via their mobile on a weekly basis while almost the same number send or receive an email from their phone.

As well as showing high rates of adoption EMEA users also show great interest in new services. Comfortably more than half of those interviewed expressed an interest in at least one of the services mentioned, with 38% interested in emergency updates (traffic and weather) and 29% interested in coupons and special offers.

Large proportions of those interviewed will pay for those services, with at least a third, on average, willing to pay for each service. The enhanced perceived value of these services is illustrated by the fact that 35% EMEA users will pay £3 for their favourite service but only 22% will pay £1.

### 40%

access the Internet via their mobile phone

### 29%

are interested in coupons and special offers

# EMEA: Service Awareness + Usage

EMEA shows consistently high levels of usage of mobile services, often higher than in other global regions. In areas such as watching live TV (64% - 61%), checking traffic (58% - 53%), and accessing Skype from a mobile (39% - 35%) EMEA leads the world in levels of awareness

Elsewhere awareness is in line with global levels, with nine-out-of-ten (92%) EMEA mobile users aware they can access internet, 88% aware they can access the internet, and 84% aware they can play and store music.

While usage in the EMEA region is significantly lower than in other regions there is, nevertheless, high usage of some key mobile services: 41% have accessed internet, 34% have used instant messenger, and 40% have played and stored music (fig. 1).

**92%**

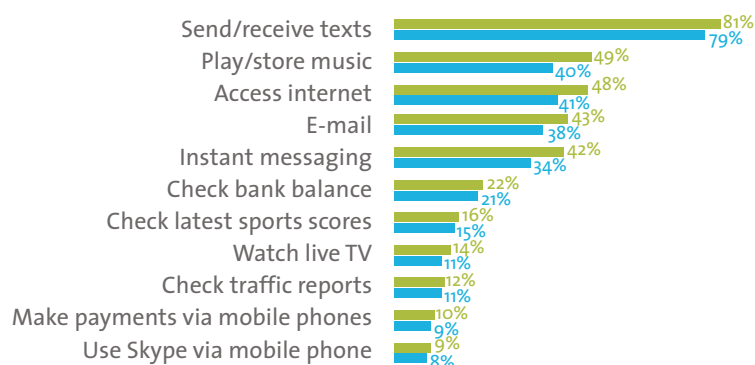
users are aware they can access  
internet

**84%**

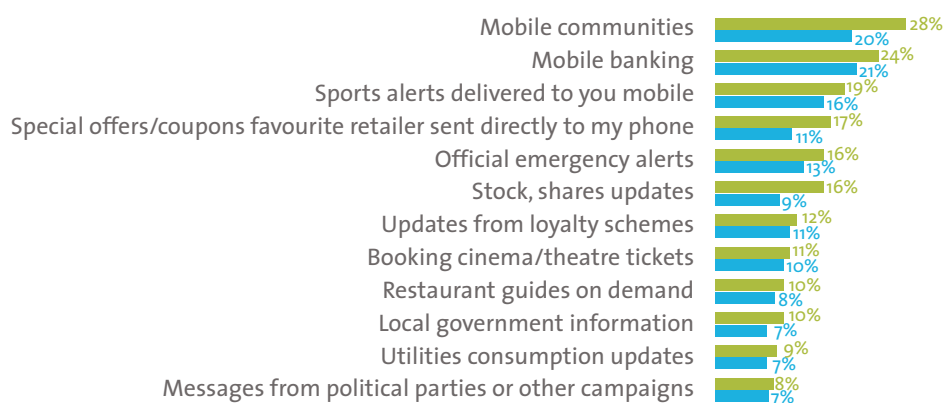
are aware they can play and store  
music

# EMEA: Service Awareness + Usage

**Figure 1: Q1b. How often have you used [the following mobile] services? (% “weekly”). Base: All mobile users**



**Figure 2: Q2b. How often have you used the service? (% “weekly”). Base: all mobile users**



# EMEA: Pricing

**Purchase inclination:** A significant proportion of EMEA users participating in the survey indicated a clear willingness to purchase mobile services. 50% of users in the region would purchase at least one of the services researched, while typically between 15% and 35% of those interested in a particular service describe themselves as willing to pay. These percentages are, however, some way below those of the rest of the world. Purchase consideration for all products is typically 15% higher in Asia Pacific and 10% higher in the Americas.

The survey asked users what services they would be interested in purchasing. The services with the highest levels of interest are cinema and theatre tickets and emergency updates with 11% and 10% respectively reporting that they would be consider paying monthly for these services.

Being able to buy cinema tickets has a considerably higher perceived value than emergency updates, at just over £3 per month to £1.50 per month. The service with the highest perceived value, however, is stock and shares updates at around £4.40.

Respondents in South Africa are most likely to consider paying for mobile services, with those in the European countries (particularly the UK and Germany) far less likely to pay. The challenge for those providing additional mobile services in the EMEA region is how to approach consumers in countries with more developed internet usage, where 'free' has been commonplace for some years, to recognise the value of services via mobile.

## Next Generation Services

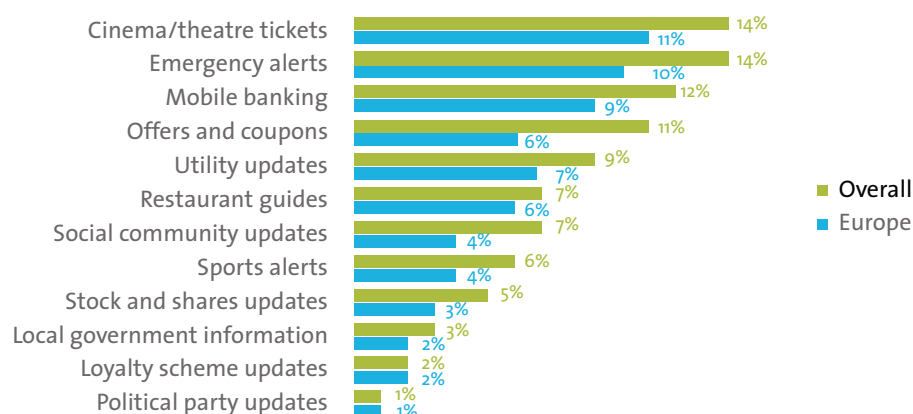
Next Generation services, likewise, show slightly lower appeal than in other regions (fig. 4). Nevertheless, these services are appealing to a large number of EMEA respondents, with 41% interested in instant messaging between mobile and PC, and 35% interested in mobile to webcam calls.

## 50%

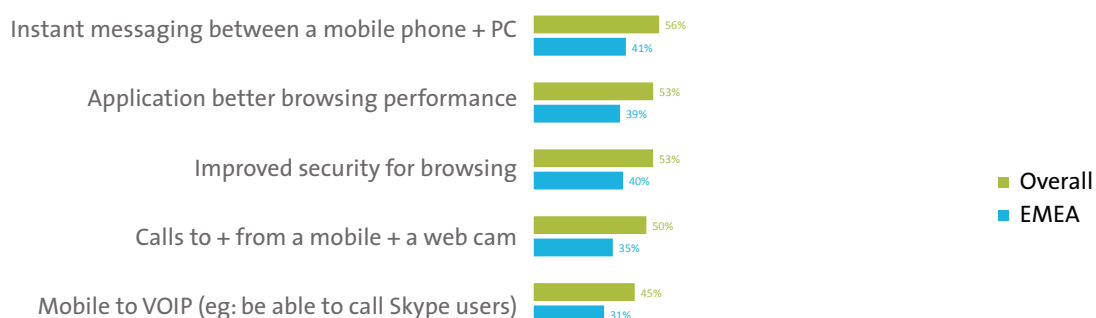
will purchase at least one of the services researched, just below the worldwide average of 55%

# EMEA: Pricing

**Figure 3: Q2e/Q3 Likelihood to purchase (if one of top 3 most valuable services). Base: All mobile users**



**Figure 4A: How interested in the following services would you be?**



# EMEA: Tables by country

**Q1b. How often have you used [the following mobile] services? (% “weekly”). Base: All mobile users**

	Overall	Total	UK	S. Africa	EMEA France	Germany	Spain	Italy
Base	4167	1543	265	255	259	252	260	252
Send/receive texts	81%	79%	75%	94%	80%	72%	90%	64%
Play/store music	48%	40%	27%	42%	33%	37%	56%	43%
Access internet	48%	41%	35%	68%	38%	27%	39%	42%
E-mail	43%	38%	35%	55%	36%	27%	33%	41%
Instant messaging	42%	34%	20%	56%	35%	15%	32%	44%
Check bank balance	22%	21%	15%	40%	22%	17%	15%	20%
Check latest sports scores	16%	15%	16%	15%	17%	10%	13%	16%
Watch live TV	14%	11%	14%	9%	16%	7%	10%	14%
Check traffic reports	12%	11%	12%	12%	12%	8%	9%	14%
Make payments via mobile phone	10%	9%	8%	15%	7%	6%	10%	10%
Use Skype via mobile phone	9%	8%	8%	7%	5%	6%	7%	17%

**Q2b. How often have you used the service? (% “weekly”). Base: All mobile users**

	Overall	Total	UK	S. Africa	EMEA France	Germany	Spain	Italy
Base	4167	1543	265	255	259	252	260	252
Mobile communities (alerts about activities of friends of your choice from a social network)	28%	20%	14%	36%	17%	14%	21%	15%
Mobile banking (this is voiceless banking, using text/internet)	24%	21%	15%	38%	16%	15%	18%	26%
Sports alerts (football, cricket scores etc) delivered to your mobile	19%	16%	14%	12%	23%	12%	17%	18%
Special offers and coupons from my favourite retailer sent directly to my phone	17%	11%	9%	15%	12%	8%	15%	10%
Official emergency alerts (e.g. bad weather, major accidents)	16%	13%	12%	10%	13%	15%	11%	16%
Stocks, shares (investment) updates	16%	9%	12%	12%	5%	9%	9%	10%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	12%	11%	11%	18%	8%	7%	9%	12%
Booking cinema/theatre tickets (by text/internet)	11%	10%	10%	8%	7%	8%	12%	13%
Restaurant guides on demand	10%	8%	9%	6%	9%	5%	10%	10%
Local Government information	10%	7%	9%	4%	5%	5%	8%	11%
Utilities (Gas, Water, Electricity) consumption updates	9%	7%	8%	3%	5%	5%	11%	10%
Messages from political parties or other campaigns (e.g. Greenpeace)	8%	7%	9%	5%	5%	6%	7%	9%

**Q2c. How interested in the services do you think you would be? Base: All mobile users**

	Overall	Total	UK	S. Africa	EMEA France	Germany	Spain	Italy
Base	4167	1543	265	255	259	252	260	252
Official emergency alerts (e.g. bad weather, major accidents)	46%	38%	30%	11%	54%	34%	46%	57%
Utilities (Gas, Water, Electricity) consumption updates	38%	24%	15%	21%	18%	16%	36%	44%
Booking cinema/theatre tickets (by text/internet)	41%	29%	20%	25%	31%	19%	41%	39%
Restaurant guides on demand	36%	22%	9%	23%	34%	11%	22%	32%
Special offers and coupons from my favourite retailer sent directly to my phone	39%	29%	25%	23%	32%	25%	31%	35%
Local Government information	31%	23%	10%	49%	13%	10%	22%	34%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	32%	21%	16%	31%	24%	13%	17%	27%
Stocks, shares (investment) updates	30%	17%	8%	44%	11%	6%	13%	20%
Mobile banking (this is voiceless banking, using text/internet)	39%	26%	21%	18%	25%	15%	33%	44%
Messages from political parties or other campaigns (e.g. Greenpeace)	28%	16%	5%	65%	5%	4%	9%	16%
Mobile communities (alerts about activities of friends of your choice from a social network)	32%	18%	10%	36%	17%	10%	17%	24%
Sports alerts (football, cricket scores etc) delivered to your mobile	27%	19%	11%	52%	8%	11%	17%	18%

# EMEA: Tables by country

**Q4a. How interested in the following services would you be? Base: All mobile users**

EMEA								
	Overall	Total	UK	S. Africa	France	Germany	Spain	Italy
Base	4167	1543	265	255	259	252	260	252
Instant messaging between a mobile phone and a PC	56%	41%	35%	7%	57%	35%	52%	61%
Application better browsing performance	53%	39%	43%	5%	56%	27%	52%	48%
Improved security for browsing	53%	40%	42%	4%	54%	30%	55%	54%
Calls to and from a mobile and a web cam	50%	35%	28%	13%	46%	28%	45%	53%
Mobile to VOIP (e.g. be able to call Skype users)	45%	31%	28%	12%	30%	25%	38%	55%

**Q2e/Q3 Likelihood to purchase (if one of top 3 most valuable services). Base: All mobile users**

	Overall	Total	UK	S. Africa	EMEA France	Germany	Spain	Italy
Base	4167	1543	265	255	259	252	260	252
Booking cinema/theatre tickets	14%	11%	6%	17%	19%	6%	11%	17%
Official emergency alerts	14%	10%	3%	26%	4%	6%	7%	12%
Mobile banking updates	12%	9%	3%	21%	7%	3%	8%	8%
Special offers and coupons	11%	6%	3%	12%	4%	1%	5%	7%
Utilities (Gas, Water, Electricity) consumption updates	9%	7%	4%	19%	4%	4%	11%	12%
Restaurant guides on demand	7%	6%	5%	7%	8%	6%	5%	8%
Mobile communities updates	7%	4%	2%	5%	4%	5%	2%	4%
Sports Alerts	6%	4%	6%	3%	2%	1%	4%	4%
Stocks, shares (investment) updates	5%	3%	2%	8%	4%	1%	5%	2%
Updates from Loyalty schemes (Airmiles, supermarkets etc.)	2%	2%	3%	0%	4%	0%	4%	0%
Local Government information	2%	2%	0%	6%	1%	3%	2%	2%
Messages from political parties or other campaigns (e.g. Greenpeace)	1%	1%	4%	0%	0%	0%	0%	0%

**Q6b Which the following services would you be interested in...? Base: All mobile users**

	Overall	Total	UK	S. Africa	EMEA France	Germany	Spain	Italy
Base	4167	1543	265	255	259	252	260	252
Reports of potentially fraudulent transactions on your account	75%	72%	55%	93%	79%	68%	68%	71%
Account balance enquires	69%	62%	41%	88%	57%	48%	63%	73%
Being able to freeze a card	65%	67%	45%	87%	70%	68%	62%	73%
Be alerted when a bill or credit card payment is due	60%	50%	38%	81%	41%	30%	48%	60%
Updates when transactions take place	60%	51%	35%	91%	36%	34%	43%	65%
Pay a bill or card	59%	50%	36%	84%	40%	32%	52%	55%
Request a call back from customer services	54%	45%	31%	79%	45%	27%	48%	42%
Statements on request	53%	50%	34%	82%	48%	25%	48%	64%
Overdraft alerts	52%	48%	29%	58%	60%	31%	45%	65%
Use mobile banking to Top Up my mobile phone (or offspring)	50%	44%	28%	70%	39%	31%	45%	54%
Communicating with your insurance company by SMS (e.g. alerts on the status of a claim)	43%	35%	21%	62%	32%	13%	38%	47%
Information requests e.g. interest rates/exchange rates	41%	31%	23%	55%	22%	18%	31%	37%
Stock market information	29%	19%	15%	22%	14%	15%	20%	29%
Financial offers	28%	17%	14%	21%	13%	11%	20%	25%
Marketing messages	21%	13%	10%	14%	10%	9%	15%	21%



## Appendix A

### Americas: currency conversion rates

Country	GBP	Local	Currency
UK	1	1	GBP
USA	0.62	1.63	USD
Canada	0.58	1.73	CAD
Mexico	0.048	20.88	MXN
Argentina	0.16	6.17	ARS

Prices in the report have been expressed in GB Pounds Sterling.

### Asia Pacific: currency conversion rates

Country	GBP	Local	Currency
UK	1	1	GBP
China	0.089	11.083	CNY
India	0.0131	75.78	INR
Australia	0.56	1.78	AUD
Indonesia	0.0001	15342	IDR
Malaysia	0.18	5.53	MYR

Prices in the report have been expressed in GB Pounds Sterling.

### EMEA: currency conversion rates

Country	GBP	Local	Currency
UK	1	1	GBP
France	0.9	1.109	EUR
Germany	0.9	1.109	EUR
Spain	0.9	1.109	EUR
Italy	0.9	1.109	EUR
South Africa	0.082	12.15	ZAR

Prices in the report have been expressed in GB Pounds Sterling.

## + info

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